DEFENSE CONTRACT MANAGEMENT AGENCY

DCMA

ACQUISITION INSIGHT GLOBAL ENGAGEMENT

FORM 1 Tracking 1.0 Reports

August 2011

ITCSO Training Academy

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Course Topics

Note: Links will *only* work in PowerPoint's slide show view.

Module One	FORM 1 Tracking Reports
Lesson One	**Accessing FORM 1 Reports**
Topic One	Accessing FORM 1 Reports
Topic Two	Report Formats
Lesson Two	**Running FORM 1 Reports**
Topic One	Running a Report
Topic Two	Viewing a Report

Module Two	FORM 1 Tracking Ad hoc Reports
Lesson One	**Ad hoc Reports Overview**
Topic One	Ad hoc Reports Overview
Topic Two	Launch a New Query
Topic Three	Ad hoc Report Components
Lesson Two	**Using Form 1 Tracking Ad hoc Reports**
Topic One	Inserting Data
Topic Two	Editing Data
Topic Three	Changing Layout
Topic Four	Running a Report
Topic Five	Saving a Report

Module One

FORM 1 Tracking Reports

Module One Objectives

At the end of this module you should be able to:

- Access FORM 1 Tracking Reports
- Select different filters in the reports
- Run the reports
- View the reports

Module One Lessons

Module One Lessons

Lesson One	Accessing FORM 1 Tracking Reports
Lesson Two	Running FORM 1 Tracking Reports

Module One – FORM 1 Tracking Reports

Lesson One – Accessing FORM 1 Tracking Reports

Topic One	Accessing FORM 1 Tracking Reports
Topic Two	Report Formats

Course Topics

Topic One – Accessing Reports

How to Access FORM 1 Tracking Reports – External DCAA Users

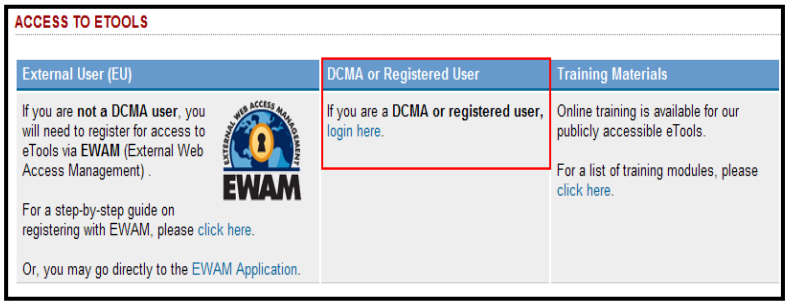
External users must register through the **External Web Access Manager (EWAM)** in order to gain access to DCMA's eTools application and reports.

Click on the link below for details on gaining access through EWAM:
http://www.dcma.mil/ITCSO/CBT/EWAM/overview.cfm

Accessing FORM 1 Tracking – External Users(Graphic 1.1.1.1 - 1.1.1.4)

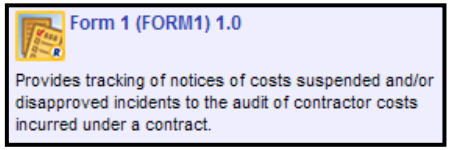
1.	*Open* **www.dcma.mil** in a new browser window.
2.	*Select* **eTools** from the toolbar. • Once you have been granted access, you will be asked to log in.
3.	*Click* the **login here** link under the **DCMA or Registered User** section. • The login screen appears.
4.	*Type* in your **User ID** and **Password**. • A list of the application(s) you have been given access to will appear.
5.	*Click* **Reports** from the toolbar. • A list of the reports you have been given access to will appear. • *Select* the **FORM 1 Tracking Reports** icon.

Graphic 1.1.1.1 : DCMA Menu Bar


ACCESS TO ETOOLS
External User (EU)
If you are not a DCMA user, you will need to register for access to eTools via EWAM (External Web Access Management) .
For a step-by-step guide on registering with EWAM, please click here.
Or, you may go directly to the EWAM Application.
EWAM
DCMA or Registered User
If you are a DCMA or registered user, login here.
Training Materials
Online training is available for our publicly accessible eTools.
For a list of training modules, please click here.

Graphic 1.1.1.2: eTools External User Login

Graphic 1.1.1.3: eTools Reports Link


Form 1 (FORM1) 1.0
Provides tracking of notices of costs suspended and/or disapproved incidents to the audit of contractor costs incurred under a contract.

Graphic 1.1.1.4: FORM 1 Tracking Reports Icon

Course Topics

Topic One – Accessing Reports

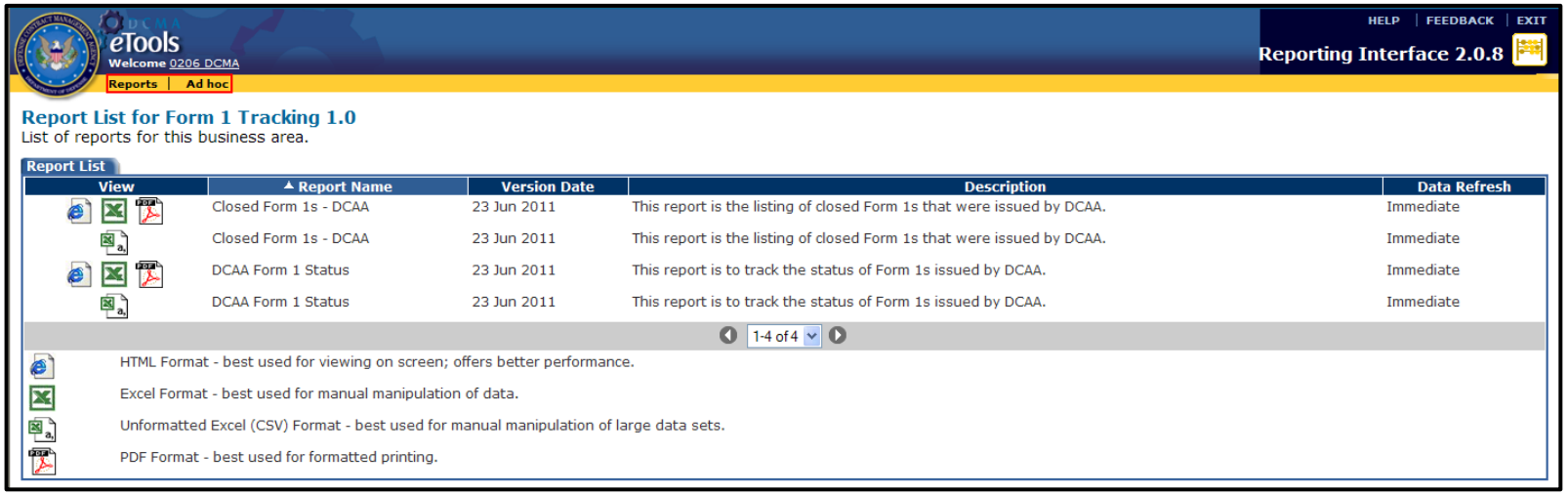
How to Access FORM 1 Tracking Reports – External DCAA Users (Continued)

The **Report List for Form 1 Tracking 1.0** displays by default. The top-navigation menu displays links for **Reports** and **Ad hoc**.

Clicking on the **Report** link displays the **Reports List** screen.

Clicking on the **Ad hoc** link displays the **Ad Hoc Saved Query** screen.

Note: Only Administrators can see this link and have access to Ad hoc reporting.


eTools
Welcome 0206 DCMA
Reports | Ad hoc
HELP | FEEDBACK | EXIT
Reporting Interface 2.0.8
Report List for Form 1 Tracking 1.0
List of reports for this business area.
Report List
View
Report Name
Version Date
Description
Data Refresh
Closed Form 1s - DCAA
23 Jun 2011
This report is the listing of closed Form 1s that were issued by DCAA.
Immediate
Closed Form 1s - DCAA
23 Jun 2011
This report is the listing of closed Form 1s that were issued by DCAA.
Immediate
DCAA Form 1 Status
23 Jun 2011
This report is to track the status of Form 1s issued by DCAA.
Immediate
DCAA Form 1 Status
23 Jun 2011
This report is to track the status of Form 1s issued by DCAA.
Immediate
1-4 of 4
HTML Format - best used for viewing on screen; offers better performance.
Excel Format - best used for manual manipulation of data.
Unformatted Excel (CSV) Format - best used for manual manipulation of large data sets.
PDF Format - best used for formatted printing.

Graphic 1.1.1.5: Report List for Form 1 Tracking 1.0

Topic Two – Report Formats

FORM 1 Tracking Report Formats

The file formats used to display reports are defined at the bottom of the Report List page for each application. If an icon does not display next to a report name, that format is not available for that report.

To see data in a specific report format, click on the icon next to the report.

	HTML	•Report prompts page displays in a new web page. •When you choose to run the report, the results display in a web page.
	Excel	•Report prompts page displays in a new web page. •When you choose to run the report, the results display in Excel. •Excel's Save As option will save the file as a comma separated value (CSV) format.
	CSV	•Unformatted Excel (CSV) Format - best used for manual manipulation of large data sets.
	PDF	•Report prompts page displays in a new web page. •When you choose to run the report, the results display in Adobe Acrobat *.pdf format.

Course Topics

Module One – Lesson One Review

Module One – Lesson One Review – Accessing FORM 1 Tracking Reports

Lesson One covered the following topics:

Topic One	Accessing FORM 1 Tracking Reports
Topic Two	Report Formats

Course Topics

Module One – FORM 1 Tracking Reports

Lesson Two – Running FORM 1 Tracking Reports

Topic One	Running a Report
Topic Two	Viewing a Report

Topic One – Running a Report

Reports and Descriptions

The table below lists the two available FORM 1 Tracking reports for DCAA users and provides a description for each.

Closed Form 1s - DCAA
• Provides a listing of closed Form 1s that were issued by DCAA.

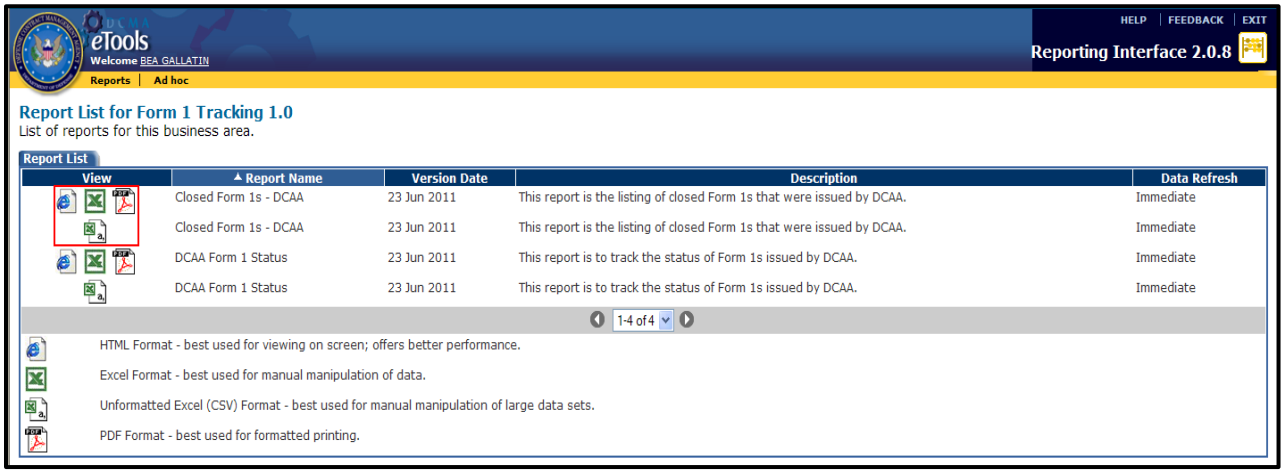
DCAA Form 1 Status
• Provides a report to track the status of Form 1s issued by DCAA.

Topic One – Running a Report

Running a Report

Find the report you would like to view from the report list (Graphic 1.2.1.1).

Running a Report (Graphic 1.2.1.1)	
1.	*Click* the **format (HTML, Excel, PDF, or CSV)** icons for the report you would like to run.
Continued on next slide...	


eTools
Welcome BEA GALLATIN
HELP | FEEDBACK | EXIT
Reporting Interface 2.0.8
Reports | Ad hoc
Report List for Form 1 Tracking 1.0
List of reports for this business area.
Report List
View | Report Name | Version Date | Description | Data Refresh
Closed Form 1s - DCAA | 23 Jun 2011 | This report is the listing of closed Form 1s that were issued by DCAA. | Immediate
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HTML Format - best used for viewing on screen; offers better performance.
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PDF Format - best used for formatted printing.

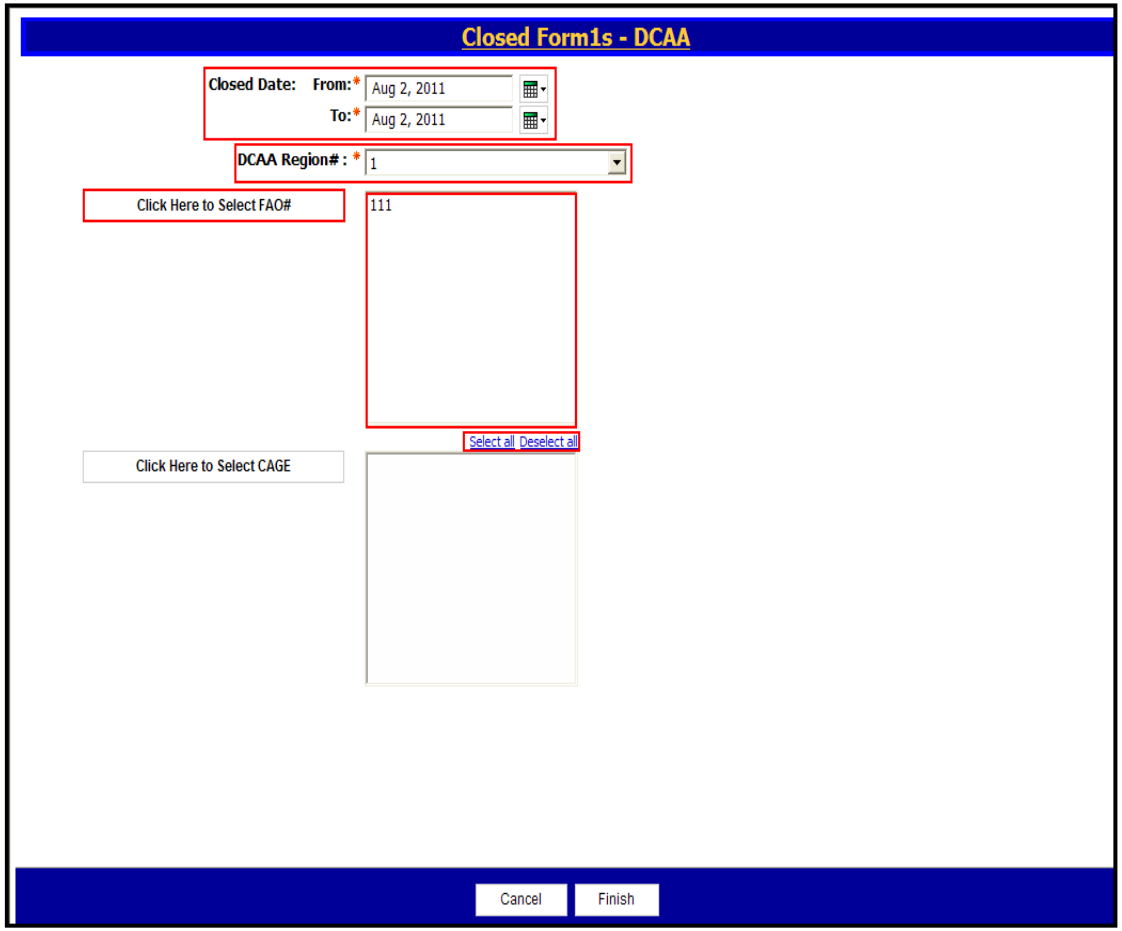
Graphic 1.2.1.1: Report List

Topic One – Running a Report

Running a Report

The **Report Filter** page appears. You can select specific filters for the data you would like to see on your report.

Running a Report (Graphic 1.2.1.2 – 1.2.1.3)	
2.	*Select* the **Closed From and To** date fields. • Use the **Calendar** icon to select the date from the Calendar pop-up window.
3.	*Select* the **DCAA Region #** for the drop-down list.
4.	*Click* on the **Click Here to Select FAO #** dynamic button to populate the **FAO #** filter options. • Use **Select all** or **Deselect all** to select or deselect all options. • Use the **shift** key to select a range of options. To select two or more filters that are separated, use the CTRL key.
Continued on next slide...	



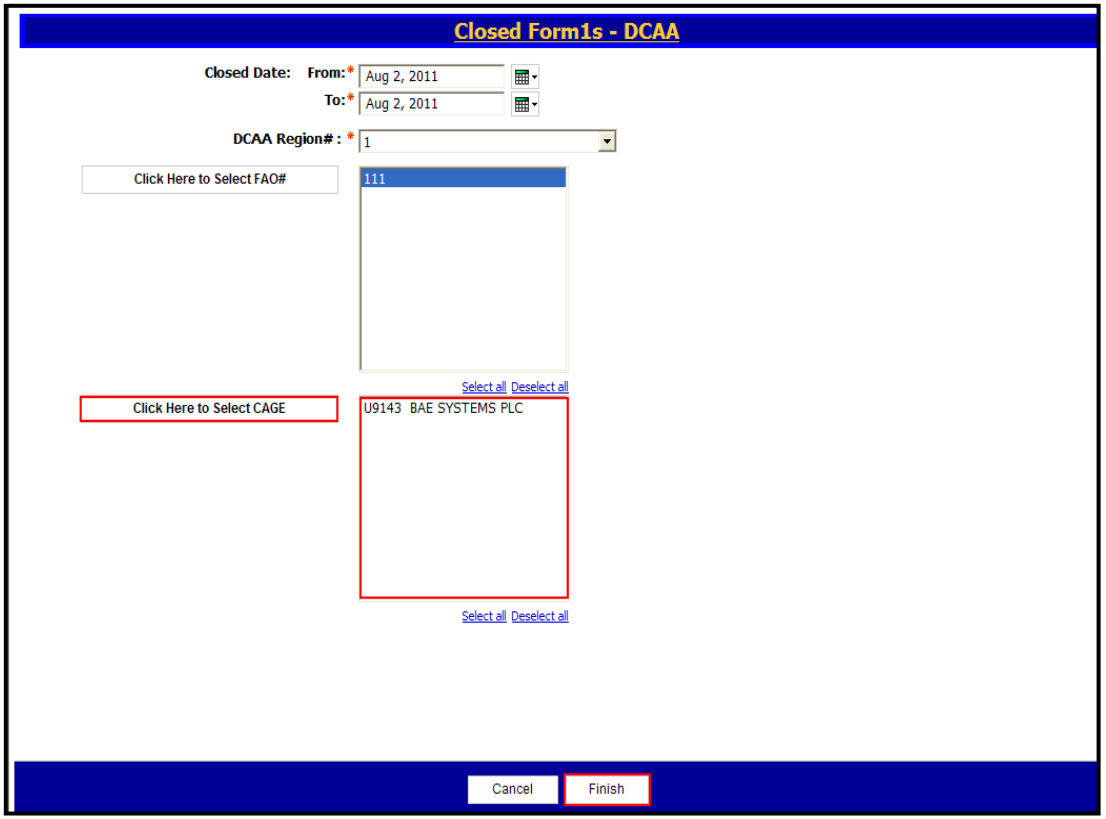
Graphic 1.2.1.2: Reports Filter Page

Course Topics

Topic One – Running a Report

Running a Report (Continued)

Running a Report (Graphic 1.2.1.3 – 1.2.2.1)	
5.	*Click* on the **Click Here to Select CAGE** dynamic button to populate the **CAGE** filter options. • *Select* the **CAGE** from the list of options.
6.	*Click* the **Finish** button. • The **Reports Output** page displays .



Graphic 1.2.1.3: Reports Filter Page

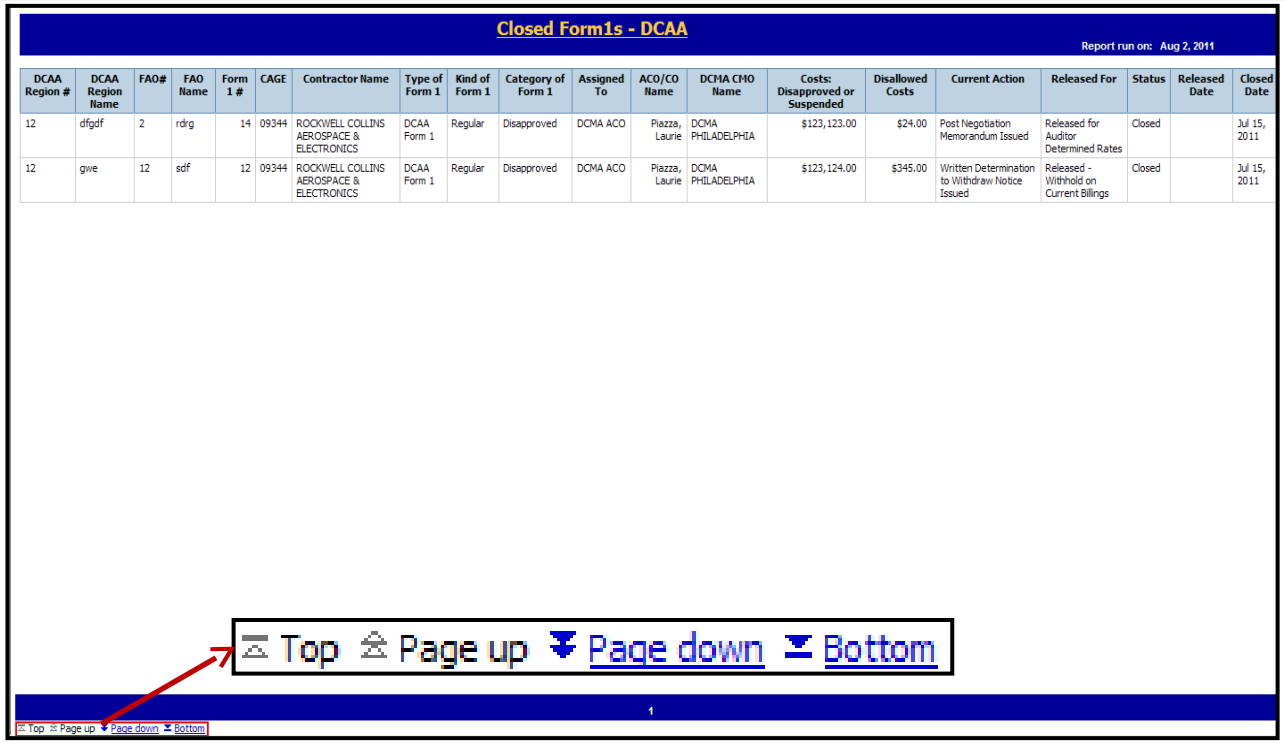
Topic Two – Viewing a Report

Viewing Report Output

Selecting the HTML format, displays the report in a web page.

Links at the bottom of the page allow you to:

- Return to the **Top** of the report
- Go to one **Page up**
- Go to one **Page down**
- **Bottom** link takes you to the end of the report where the filters you specified are displayed



DCAA Region #	DCAA Region Name	FAO#	FAO Name	Form 1 #	CAGE	Contractor Name	Type of Form 1	Kind of Form 1	Category of Form 1	Assigned To	ACO/CO Name	DCMA CMO Name	Costs: Disapproved or Suspended	Disallowed Costs	Current Action	Released For	Status	Released Date	Closed Date
12	dfgdf	2	rdrg	14	09344	ROCKWELL COLLINS AEROSPACE & ELECTRONICS	DCAA Form 1	Regular	Disapproved	DCMA ACO	Piazza, Laurie	DCMA PHILADELPHIA	$123,123.00	$24.00	Post Negotiation Memorandum Issued	Released for Auditor Determined Rates	Closed		Jul 15, 2011
12	gwe	12	sdf	12	09344	ROCKWELL COLLINS AEROSPACE & ELECTRONICS	DCAA Form 1	Regular	Disapproved	DCMA ACO	Piazza, Laurie	DCMA PHILADELPHIA	$123,124.00	$345.00	Written Determination to Withdraw Notice Issued	Released - Withhold on Current Billings	Closed		Jul 15, 2011

Graphic 1.2.2.1: Example FORM 1 Report, HTML Format

Course Topics

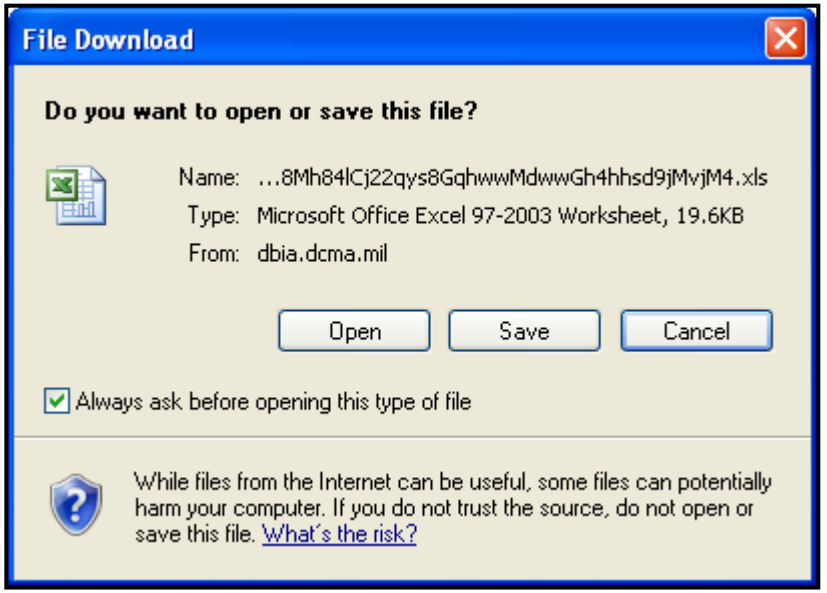
Topic Two – Viewing a Report

Viewing Report Output

Selecting the Excel version open the report in an Excel spreadsheet. A dialog box appears prompting you to open or save the Excel file.

Saving the file enables you to view the report at a later time. The following steps, illustrates how to save and view the report.

Save and View an Excel File (Graphics 1.2.2.2 &1.2.2.3)	
1.	*Click* on the **Open** button in the File Download dialog box. • The report is displayed in Excel spreadsheet.


File Download
Do you want to open or save this file?
Name: ...8Mh84lCj22qys8GqhwwMdwwGh4hhsd9jMvjM4.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 19.6KB
From: dbia.dcma.mil
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Graphic 1.2.2.2: File Download Dialog Box

Course Topics

Topic Two – Viewing a Report

Viewing Report Output

The report results displays in an Excel spreadsheet.

	A	B	C	D	E	F	G	H	I
1		**Closed Form1s - DCAA**							
2		Report run on: Aug 2, 2011							
3	DCAA Region #	DCAA Region Name	FAO#	FAO Name	Form 1 #	CAGE	Contractor Name	Type of Form 1	Kind of Form 1
4	12	dfgdf	2	rdrg	14	09344	ROCKWELL COLLINS AEROSPACE & ELECTRONICS	DCAA Form 1	Regular
5	12	gwe	12	sdf	12	09344	ROCKWELL COLLINS AEROSPACE & ELECTRONICS	DCAA Form 1	Regular
6		1							
7									
8		**Closed Form1s - DCAA**							
9		Report run on: Aug 2, 2011							
10	**Closed Date:**	Between Aug 6, 2007 and Aug 2, 2011							
11	**DCAA Region #:**	12							
12	**DCMA FAO#:**	All							
13	**CAGE:**	09344 ROCKWELL COLLINS AEROSPACE & ELECTRONICS, 1DRT7 CIRCOR AEROSPACE, INC.							

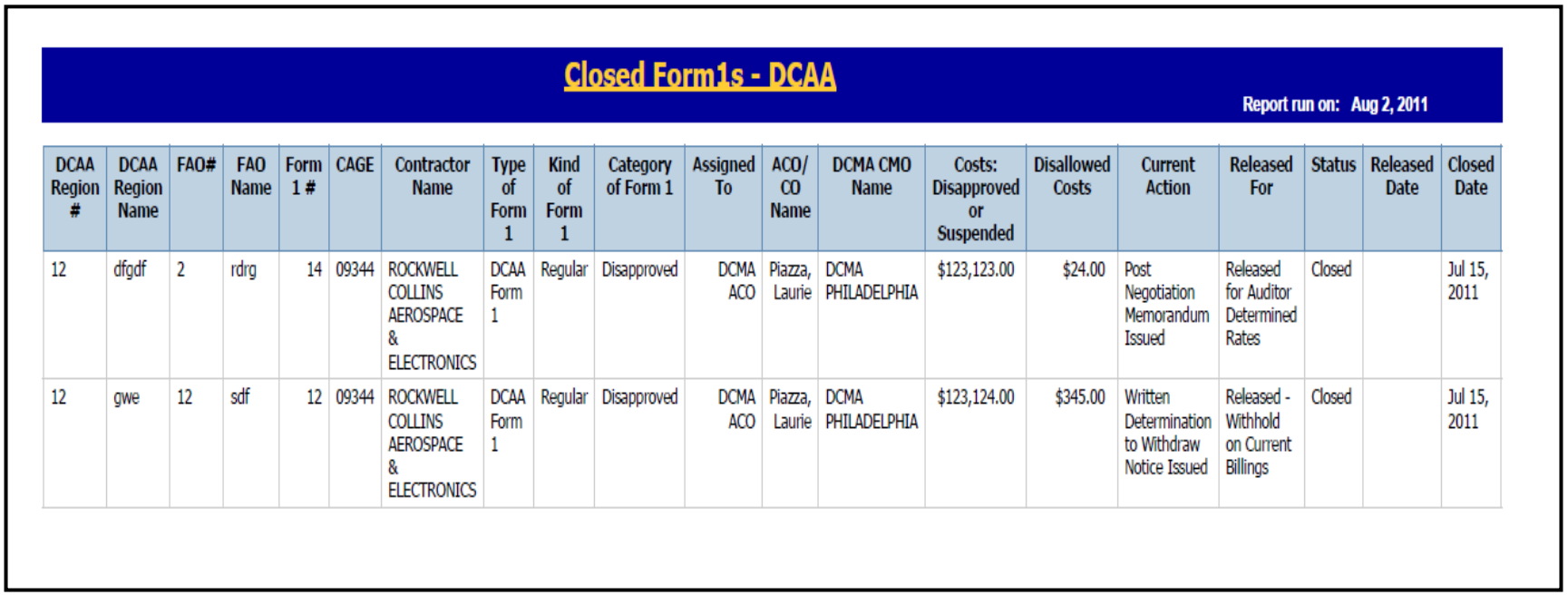
Graphic 1.2.2.3: Example FORM 1 Tracking Report, Excel Format

Course Topics

Topic Two – Viewing a Report

Viewing Report Output

Selecting the Adobe Acrobat PDF format displays the report results in a PDF file.



Closed Form1s - DCAA

Report run on: Aug 2, 2011

DCAA Region #	DCAA Region Name	FAO#	FAO Name	Form 1 #	CAGE	Contractor Name	Type of Form 1	Kind of Form 1	Category of Form 1	Assigned To	ACO/ CO Name	DCMA CMO Name	Costs: Disapproved or Suspended	Disallowed Costs	Current Action	Released For	Status	Released Date	Closed Date
12	dfgdf	2	rdrg	14	09344	ROCKWELL COLLINS AEROSPACE & ELECTRONICS	DCAA Form 1	Regular	Disapproved	DCMA ACO	Piazza, Laurie	DCMA PHILADELPHIA	$123,123.00	$24.00	Post Negotiation Memorandum Issued	Released for Auditor Determined Rates	Closed		Jul 15, 2011
12	gwe	12	sdf	12	09344	ROCKWELL COLLINS AEROSPACE & ELECTRONICS	DCAA Form 1	Regular	Disapproved	DCMA ACO	Piazza, Laurie	DCMA PHILADELPHIA	$123,124.00	$345.00	Written Determination to Withdraw Notice Issued	Released - Withhold on Current Billings	Closed		Jul 15, 2011

Graphic 1.2.2.4: Example Form 1 Tracking Report, PDF Format

Course Topics

Module One – Lesson Two Review

Module One – Lesson Two Review – Running FORM 1 Tracking Reports

Lesson Two covered the following topics:

Topic One	Running a Report
Topic Two	Viewing a Report

Course Topics

Module Two

FORM 1 Tracking Ad Hoc Reports

Module Two Objectives

At the end of this module you will be able to:

- Describe Ad hoc reports
- Launch Query Studio to start a new query
- Insert and edit data
- Change data layout
- Run Ad hoc reports in various report formats
- Save Ad hoc reports

Module Two Lessons

Lesson One	Ad Hoc Reports Overview
Lesson Two	Using FORM 1 Tracking Ad Hoc Reports

Module Two– FORM 1 Tracking Ad hoc Reports

Lesson One – Ad hoc Reports Overview

Topic One	Ad hoc Reports Overview
Topic Two	Launch a New Query
Topic Three	Ad hoc Report Components

Topic One – Ad Hoc Reports Overview

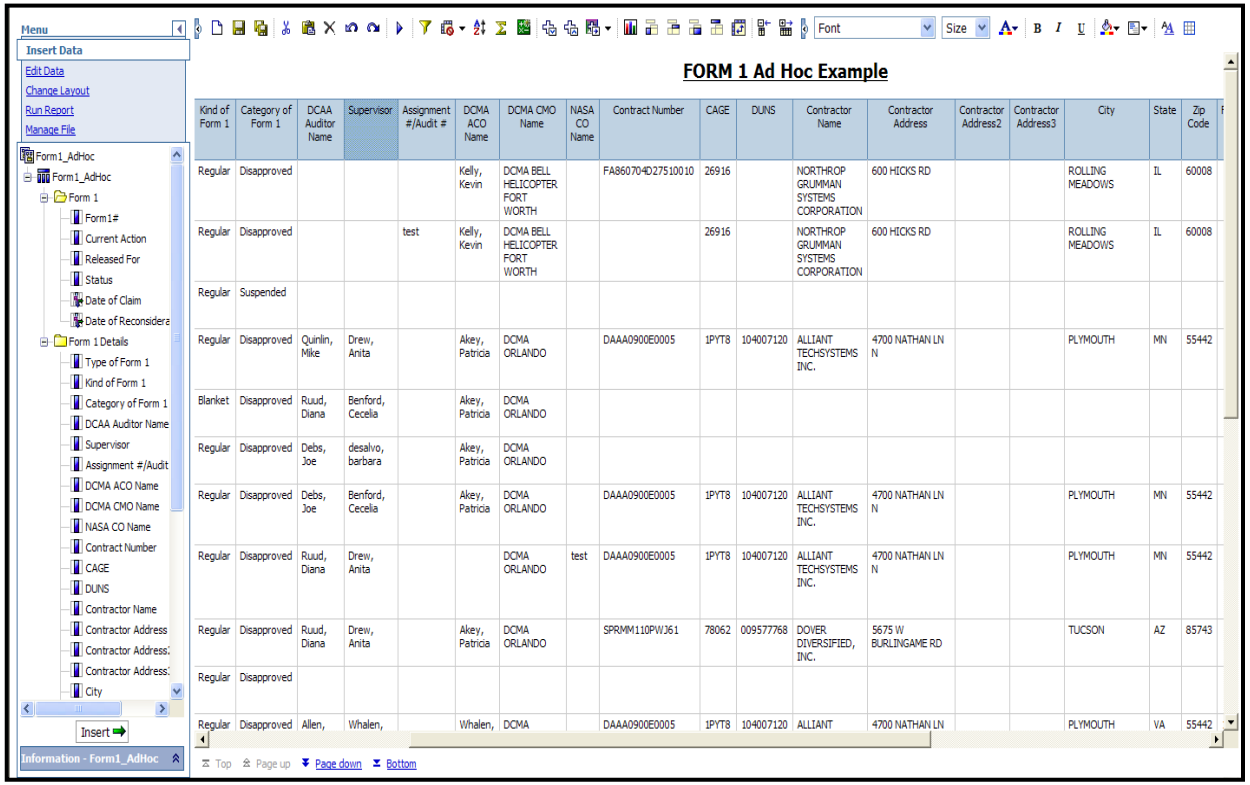
About Ad Hoc Reports

Only DCAA Administrators will have access to Ad hoc reporting.

An Ad hoc report is a report that is created for a specific task and thus cannot be adapted for other purposes.

An Ad hoc report provides you with the flexibility to:

- Select the types of data to be shown
- Manipulate the data shown
- Change the display of selected data
- Report the data in a different format
- Save the data for future use



Kind of Form 1	Category of Form 1	DCAA Auditor Name	Supervisor	Assignment #/Audit #	DCMA ACO Name	DCMA CMO Name	NASA CO Name	Contract Number	CAGE	DUNS	Contractor Name	Contractor Address	Contractor Address2	Contractor Address3	City	State	Zip Code
Regular	Disapproved				Kelly, Kevin	DCMA BELL HELICOPTER FORT WORTH		FA860704D27510010	26916		NORTHROP GRUMMAN SYSTEMS CORPORATION	600 HICKS RD			ROLLING MEADOWS	IL	60008
Regular	Disapproved			test	Kelly, Kevin	DCMA BELL HELICOPTER FORT WORTH			26916		NORTHROP GRUMMAN SYSTEMS CORPORATION	600 HICKS RD			ROLLING MEADOWS	IL	60008
Regular	Suspended																
Regular	Disapproved	Quinlin, Mike	Drew, Anita		Akey, Patricia	DCMA ORLANDO		DAAA0900E0005	1PYT8	104007120	ALLIANT TECHSYSTEMS INC.	4700 NATHAN LN N			PLYMOUTH	MN	55442
Blanket	Disapproved	Ruud, Diana	Benford, Cecelia		Akey, Patricia	DCMA ORLANDO											
Regular	Disapproved	Debs, Joe	desalvo, barbara		Akey, Patricia	DCMA ORLANDO											
Regular	Disapproved	Debs, Joe	Benford, Cecelia		Akey, Patricia	DCMA ORLANDO		DAAA0900E0005	1PYT8	104007120	ALLIANT TECHSYSTEMS INC.	4700 NATHAN LN N			PLYMOUTH	MN	55442
Regular	Disapproved	Ruud, Diana	Drew, Anita			DCMA ORLANDO	test	DAAA0900E0005	1PYT8	104007120	ALLIANT TECHSYSTEMS INC.	4700 NATHAN LN N			PLYMOUTH	MN	55442
Regular	Disapproved	Ruud, Diana	Drew, Anita		Akey, Patricia	DCMA ORLANDO		SPRMM110PWJ61	78062	009577768	DOVER DIVERSIFIED, INC.	5675 W BURLINGAME RD			TUCSON	AZ	85743
Regular	Disapproved																
Regular	Disapproved	Allen,	Whalen,		Whalen,	DCMA		DAAA0900E0005	1PYT8	104007120	ALLIANT	4700 NATHAN LN			PLYMOUTH	VA	55442

Graphic 2.1.1.1: Sample FORM 1 Tracking Ad Hoc Report

Course Topics

Topic Two – Launch a New Query

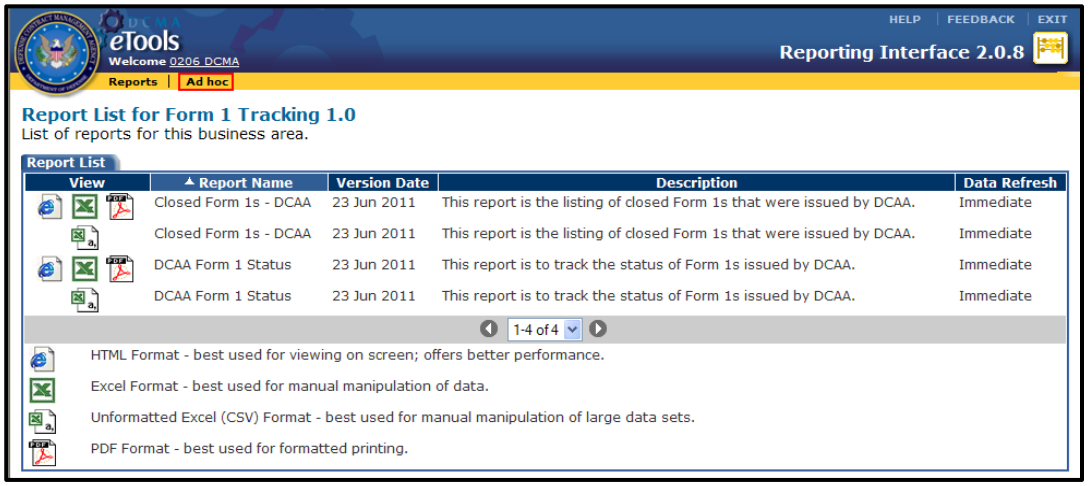
Launching New Queries

You have the option of creating your own Ad hoc report using Query Studio, or selecting an Ad hoc report from a list of saved reports.

Queries that you create in Query Studio can be saved in the *Public Folders* or *My Folders* sections.

Follow the steps below to launch a new query.

Launch a New Query (Graphics 2.1.2.1 – 2.1.3.1)	
1.	*Click* on the **Ad hoc** link from the menu bar. •The **Ad hoc Saved Query** List appears
2.	*Click* on the **Launch Query Studio** link to launch a new query. •The new query appears.


HELP | FEEDBACK | EXIT
eTools
Welcome 0206_DCMA
Reporting Interface 2.0.8
Reports | Ad hoc
Report List for Form 1 Tracking 1.0
List of reports for this business area.
Report List
View | Report Name | Version Date | Description | Data Refresh
Closed Form 1s - DCAA | 23 Jun 2011 | This report is the listing of closed Form 1s that were issued by DCAA. | Immediate
Closed Form 1s - DCAA | 23 Jun 2011 | This report is the listing of closed Form 1s that were issued by DCAA. | Immediate
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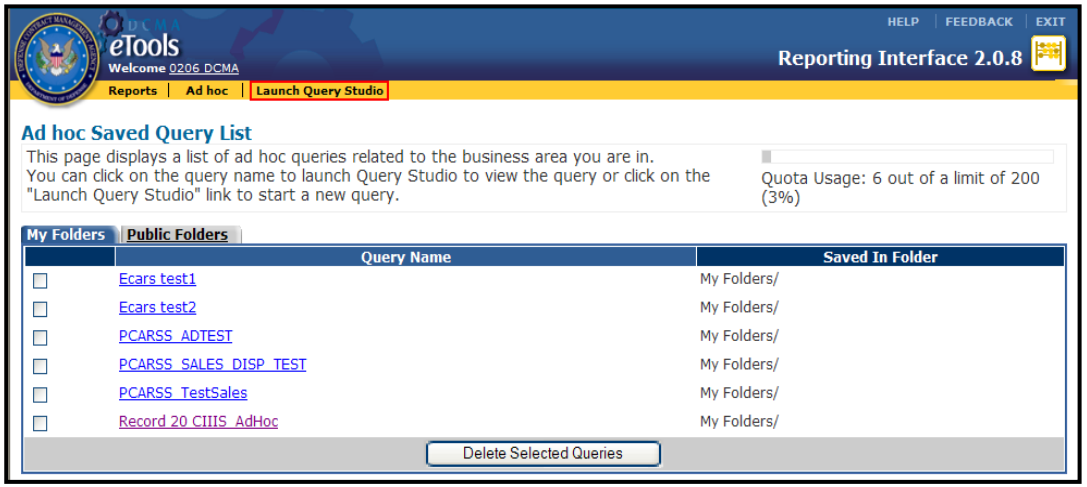
PDF Format - best used for formatted printing.

Graphic 2.1.2.1: Ad Hoc Link


HELP | FEEDBACK | EXIT
eTools
Welcome 0206_DCMA
Reporting Interface 2.0.8
Reports | Ad hoc | Launch Query Studio
Ad hoc Saved Query List
This page displays a list of ad hoc queries related to the business area you are in.
You can click on the query name to launch Query Studio to view the query or click on the "Launch Query Studio" link to start a new query.
Quota Usage: 6 out of a limit of 200 (3%)
My Folders | Public Folders
Query Name | Saved In Folder
Ecars test1 | My Folders/
Ecars test2 | My Folders/
PCARSS_ADTEST | My Folders/
PCARSS_SALES_DISP_TEST | My Folders/
PCARSS_TestSales | My Folders/
Record 20 CIIIS_AdHoc | My Folders/
Delete Selected Queries

Graphic 2.1.2.2: Launch Query Studio Link

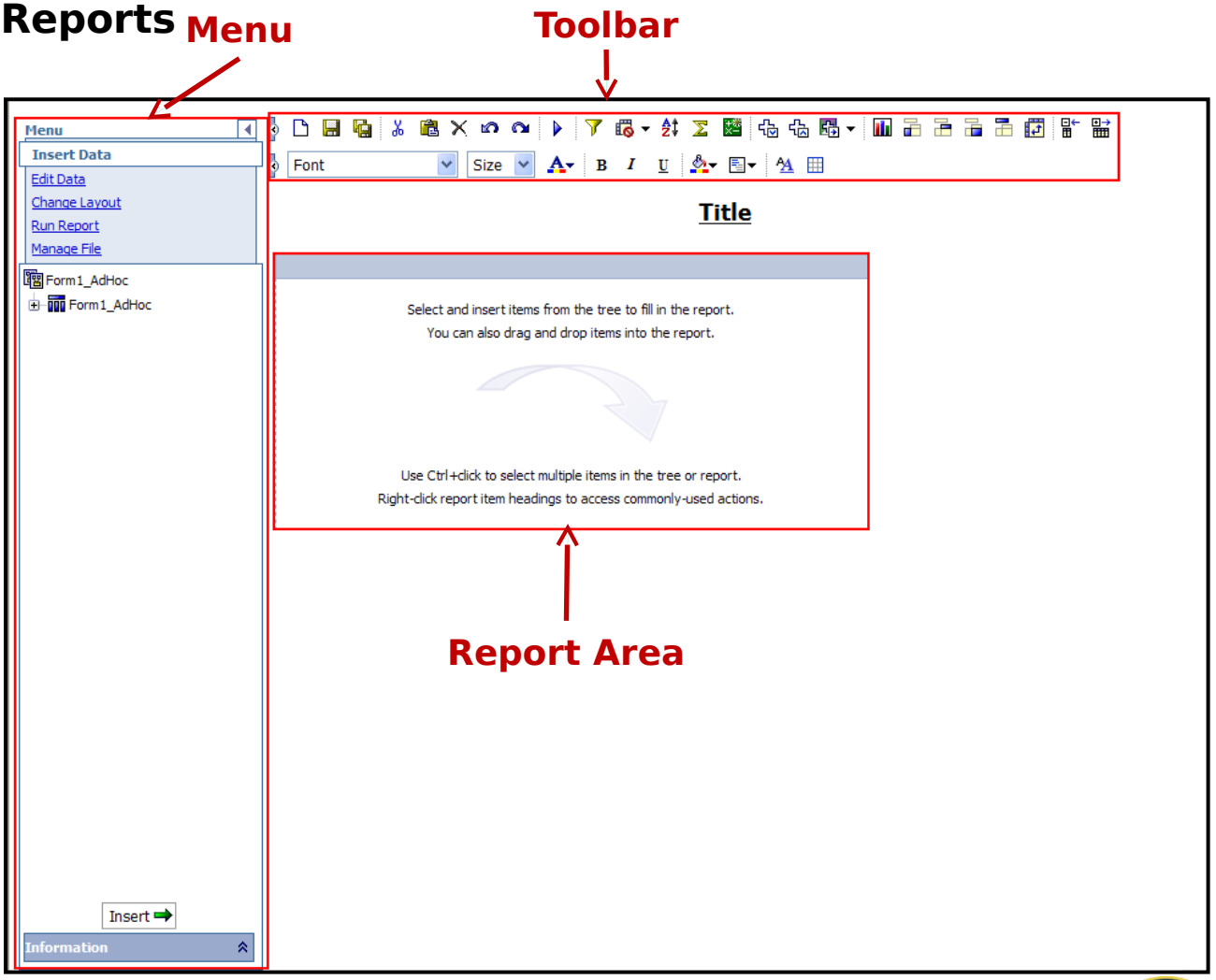
Course Topics

Topic Three – Ad Hoc Report Components

Components of Ad Hoc Reports

The Ad hoc report for FORM 1 Tracking has three main components for users to select the data fields, apply filters, and manipulate selected data.

- The **Menu** on the left includes the options to Insert Data, Edit Data, Change Layout, Run Report, and Manage File.
- The **Toolbar** on the top provides tools for saving, cutting and pasting, filtering, sorting, and manipulating the data displayed in the **Report Area**.
- The **Report Area** contains all the data for the user to view and manipulate.



Graphic 2.1.3.1: Ad Hoc Report Components

Course Topics

Module Two – Lesson One Review

Module Two – Lesson One Review – Ad hoc Reports Overview

Lesson One covered the following topics:

Topic One	Ad hoc Reports Overview
Topic Two	Launch a New Query
Topic Three	Ad hoc Report Components

Module Two – Lesson Two

Module Two– FORM 1 Tracking Ad hoc Reports

Lesson Two – Using FORM 1 Tracking Ad hoc Reports

Topic One	Inserting Data
Topic Two	Editing Data
Topic Three	Changing Layout
Topic Four	Running a Report
Topic Five	Saving a Report

Topic One – Inserting Data

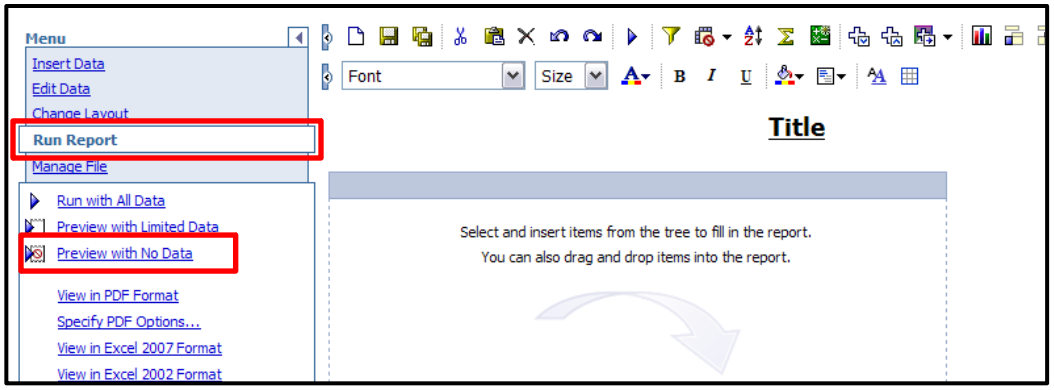
Preview With No Data

Ad hoc reports allow the user to customize a data query by selecting specific fields to define the search criteria. Before inserting data into the report, it is recommended to select Preview with No Data.

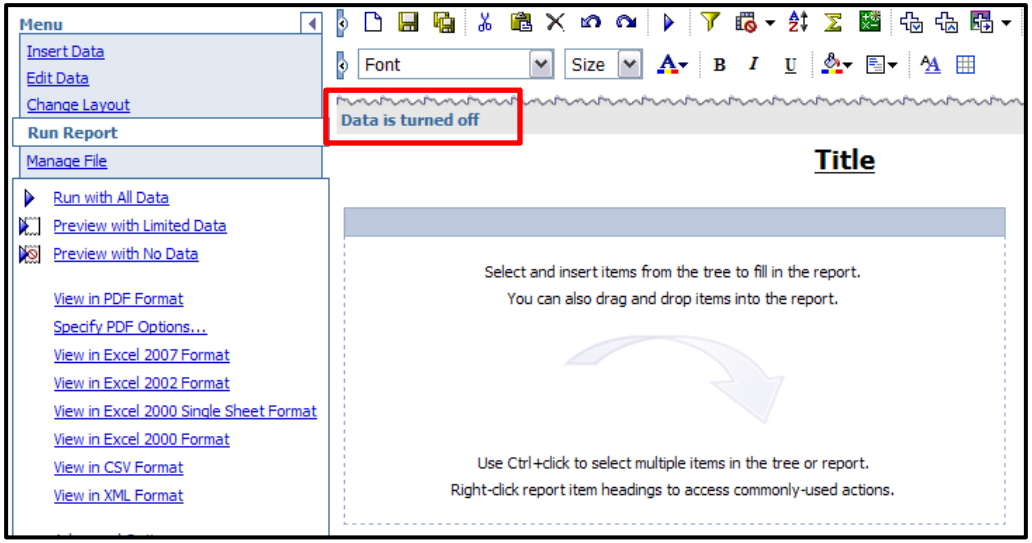
Follow the directions below to preview your report with no data before inserting the data.

Preview With No Data (Graphics 2.2.1.1 – 2.2.1.2)	
1.	*Click* **Run Report** on the Menu. •A list of tools appears
2.	*Click* **Preview with No Data**. •Data has been turned off.

Note: Previewing reports with no data will optimize the load time while designing your report, since many reports contain large amounts of data.



Graphic 2.2.1.1: Preview With No Data Link


Menu
Insert Data
Edit Data
Change Layout
Run Report
Manage File
Run with All Data
Preview with Limited Data
Preview with No Data
View in PDF Format
Specify PDF Options...
View in Excel 2007 Format
View in Excel 2002 Format
View in Excel 2000 Single Sheet Format
View in Excel 2000 Format
View in CSV Format
View in XML Format
Font
Size
Data is turned off
Title
Select and insert items from the tree to fill in the report.
You can also drag and drop items into the report.
Use Ctrl+click to select multiple items in the tree or report.
Right-click report item headings to access commonly-used actions.

Graphic 2.2.1.2: Data Turned Off

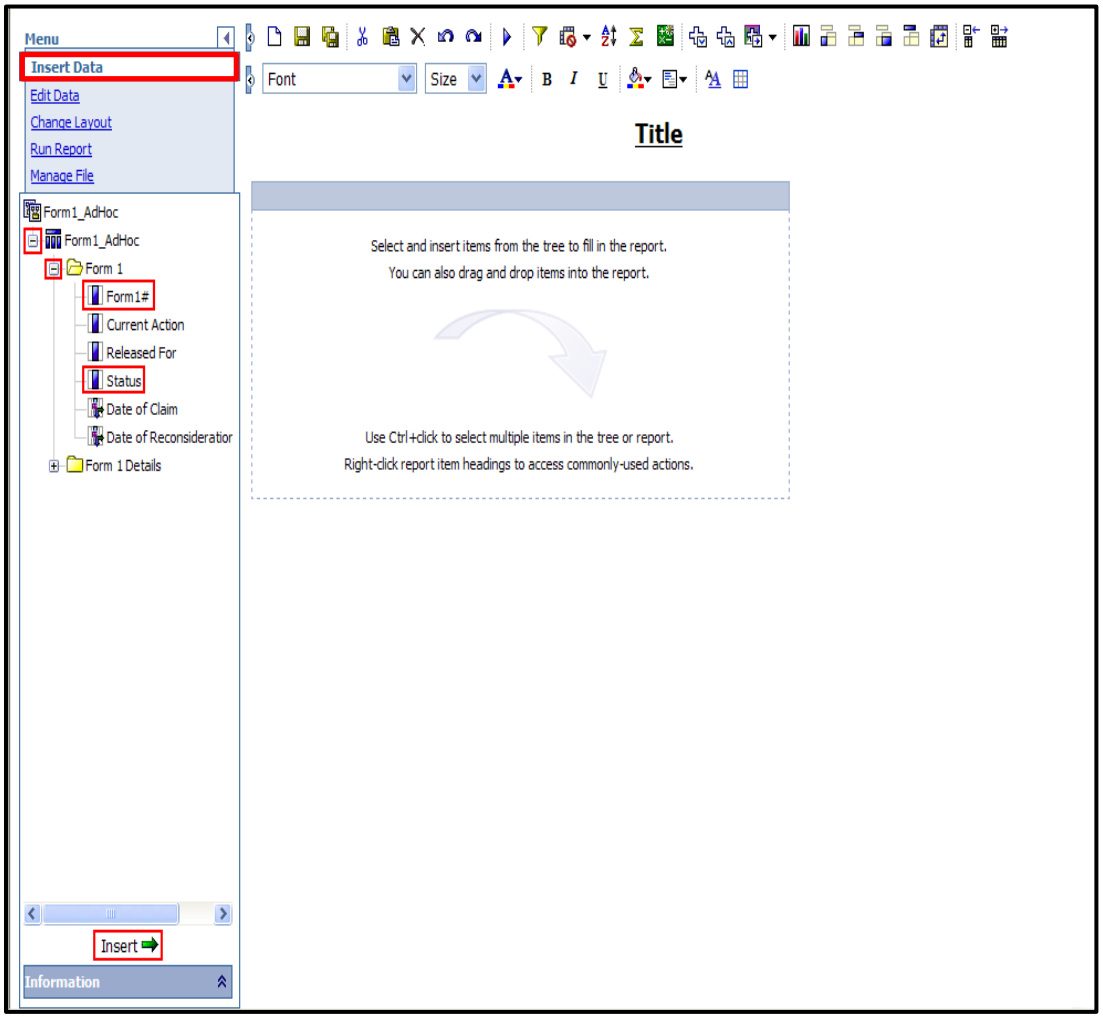
Topic One – Inserting Data

Design the Report

Now that data has been turned off, you can begin designing your Ad hoc report. Follow the directions below to insert data items.

Inserting Data (Graphics 2.2.1.3 – 2.2.1.4)	
1.	*Click* **Insert Data** on the Menu. •Available data tables appear in the Menu.
2.	*Click* the **plus (+) sign** next to Form 1 Adhoc. •The Form 1 Ad hoc data table expands.
3.	*Click* the **plus (+) sign** next to Form 1 folder. •The data table expands.
4.	*Ctrl + Click* **Form 1 #** and **Status** data items.
5.	*Click* the **Insert** button. •The report appears in the Report area (Graphic 2.2.1.4)

Note: You can also *double-click* a data item to insert it or *drag and drop* a data item into the report area to insert it.



Graphic 2.2.1.3: Expand Folders & Insert Data

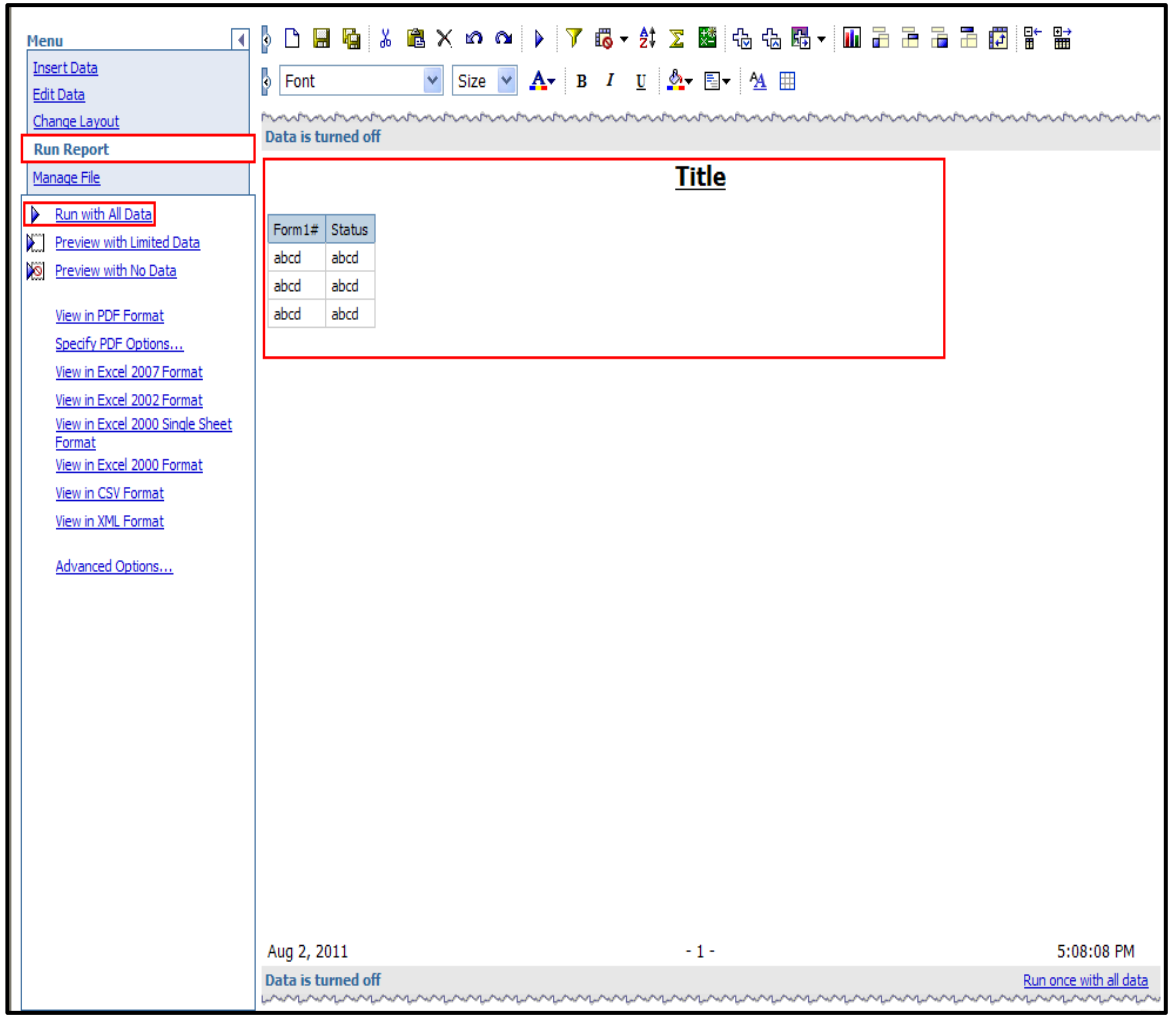
Course Topics

Topic One – Inserting Data

View Report With Data

The report is displayed containing no data. Now that the report is designed how you need it to look, follow the directions below to view the report with data.

Turn Data On (Graphics 2.2.1.4)	
1.	*Click* **Run Report** on the Menu. •A list of options appear.
2.	*Click* **Run with All Data**. •Data has been turned on.



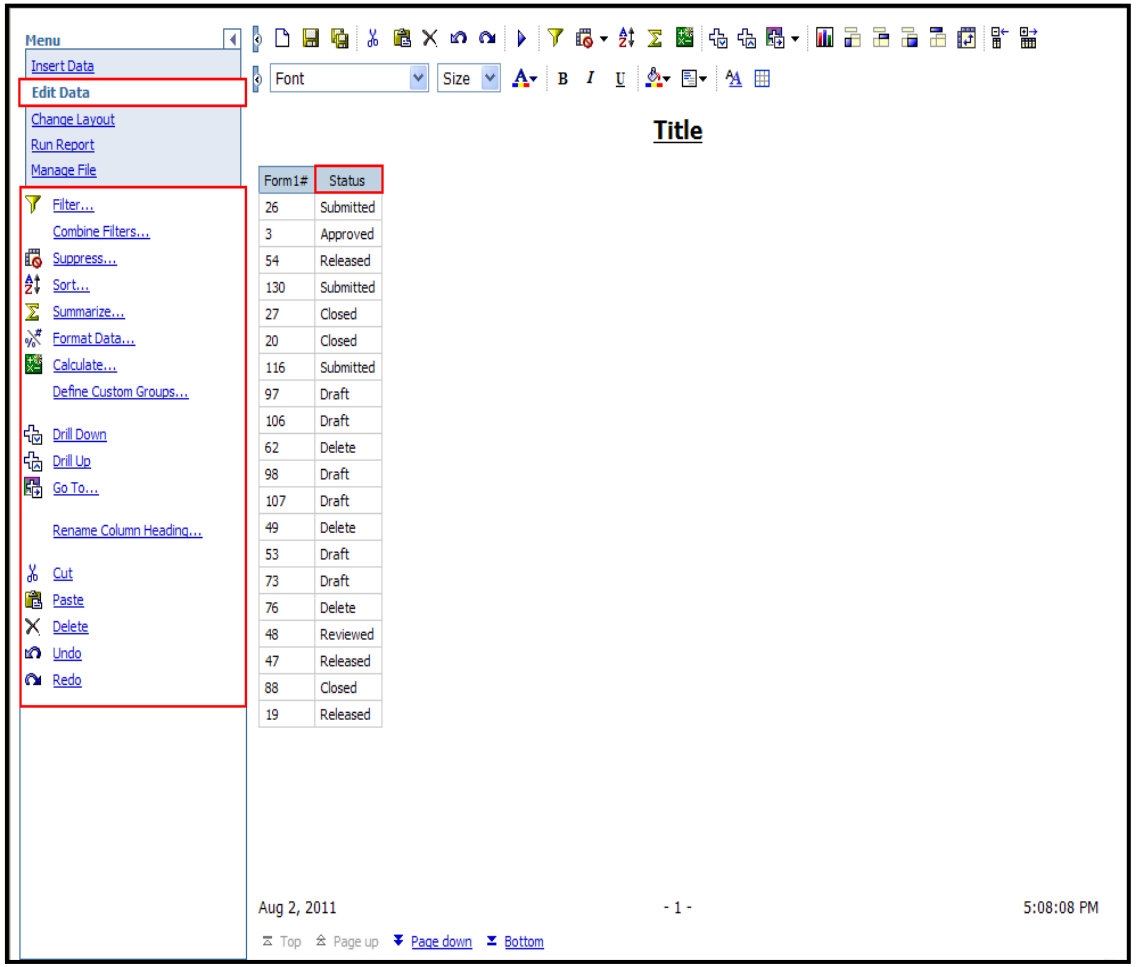
Graphic 2.2.1.4: Report View With No Data

Course Topics

Editing Data

Now that the data has been turned on, follow the steps below to Edit Data in the Ad hoc report.

Editing Data (Graphic 2.2.2.1)	
1.	*Select* **Edit Data** from the Menu. •A list of options for editing data appears.
2.	*Click* the **column heading** of the data field in the report area to select it. •The column heading is highlighted after it is selected.
3.	*Select* an **option** in the Menu to edit the data. •Most of the options in the Menu are also available on the Toolbar.



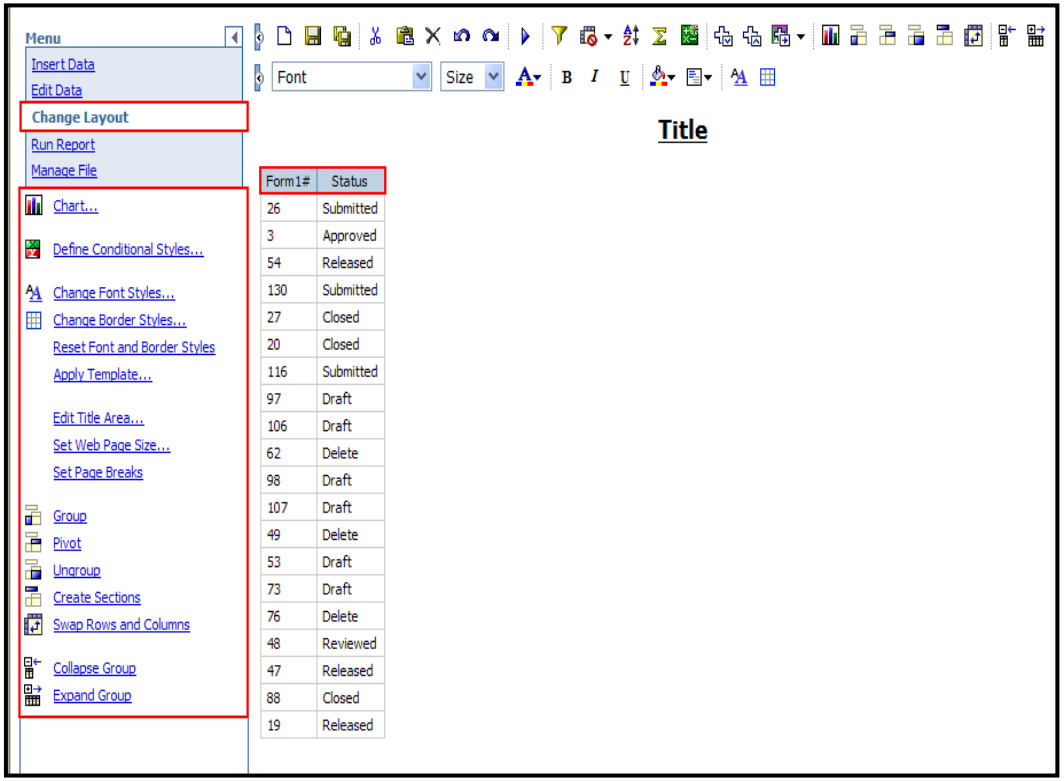
Graphic 2.2.2.1: Edit Data

Topic Three – Changing Layout

Changing Layout

Follow the steps below to change the layout of data in the Ad hoc report.

Changing Layout (Graphic 2.2.3.1)	
1.	*Select* **Change Layout** from the main menu. •A list of layout options appears in the Menu.
2.	*Click* the **column heading** in the Report Area. • The heading is highlighted after it is selected. •*Ctrl* + *Click* to select multiple column Headings.
3.	*Click* on a **layout option** in the menu to change the layout of the data.



Graphic 2.2.3.1: Change Layout

Course Topics

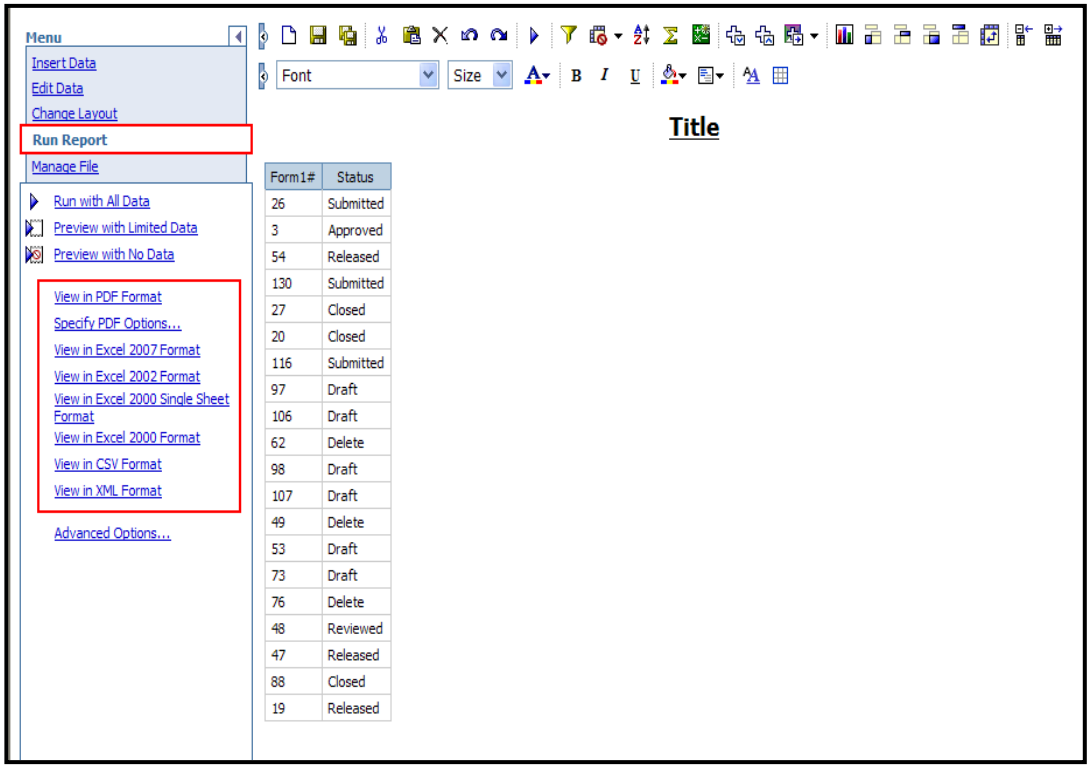
Topic Four – Running a Report

Running an Ad Hoc Report

Ad hoc Reports can be run in multiple formats for easy viewing.

Follow the steps below to run an Ad hoc report.

Running an Ad Hoc Report (Graphic 2.2.4.1)	
1.	*Click* **Run Report** on the Menu. •The Run Report options appear.
2.	*Select* the desired **format** to generate the report.



Graphic 2.2.4.1: Running Report

Course Topics

Topic Five – Saving a Report

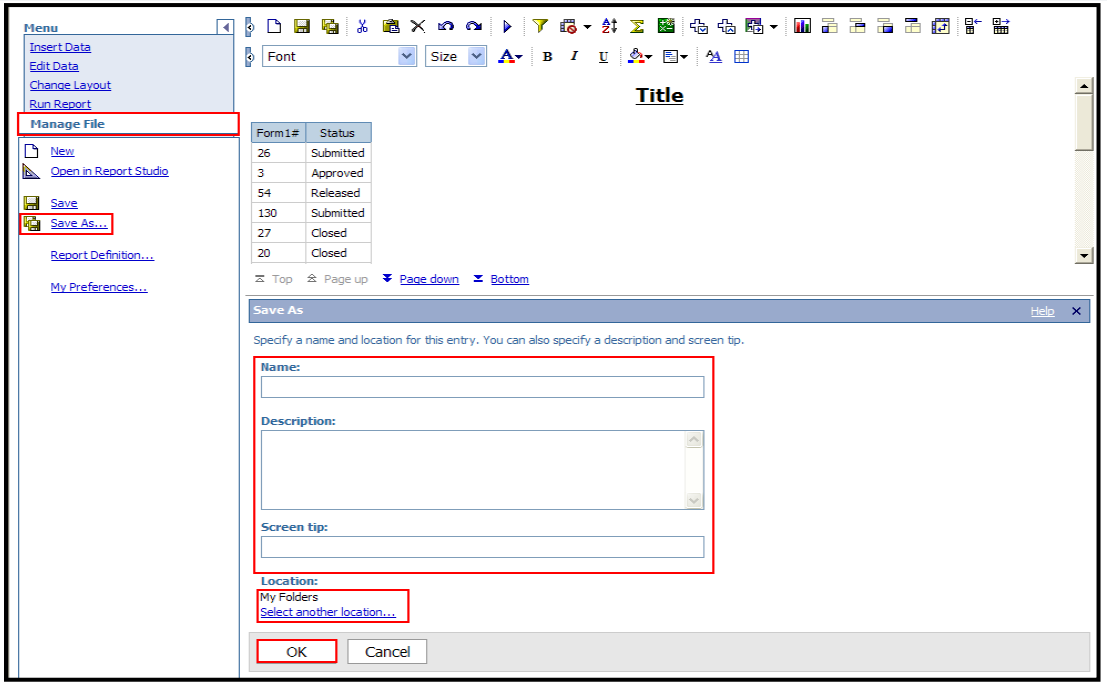
Saving Reports – My Folders

Reports can be saved and viewed at a later time.

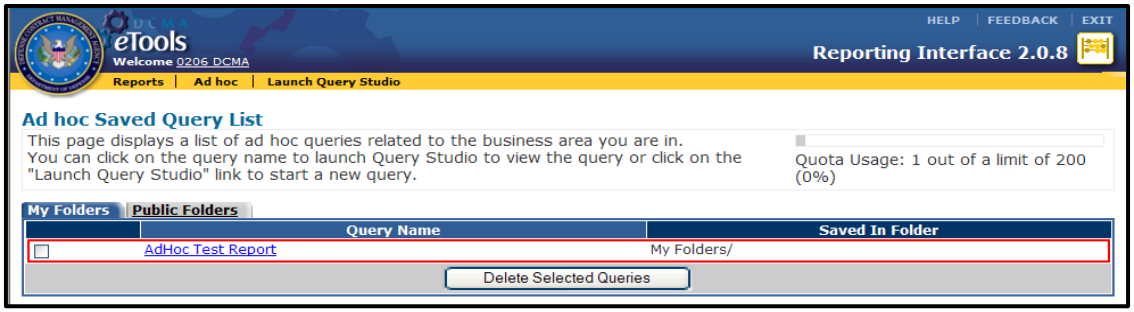
Follow the steps below to save the Ad hoc report to the *My Folders* section.

Saving Ad Hoc Reports – My Folders (Graphics 2.2.5.1 – 2.2.5.2)	
1.	*Select* **Manage File** from the Menu. •A list of **Save** options appear in the Menu.
2.	*Select* **Save As**. •The **Save As** window appears.
3.	*Enter* a **Name**, **Description**, or **Screen tip** for the report. • As a default, the file will be saved to *My Folders* .
4.	*Click* **OK**. •The saved report now appears in the **Ad hoc Saved Query List.**

Note: Only you can access Ad hoc reports saved in *My Folders*.



Graphic 2.2.5.1: Manage File


HELP
FEEDBACK
EXIT
eTools
Welcome 0206 DCMA
Reporting Interface 2.0.8
Reports
Ad hoc
Launch Query Studio
Ad hoc Saved Query List
This page displays a list of ad hoc queries related to the business area you are in.
You can click on the query name to launch Query Studio to view the query or click on the "Launch Query Studio" link to start a new query.
Quota Usage: 1 out of a limit of 200 (0%)
My Folders
Public Folders
Query Name
Saved In Folder
AdHoc Test Report
My Folders/
Delete Selected Queries

Graphic 2.2.5.2: Ad Hoc Saved Query List

Course Topics

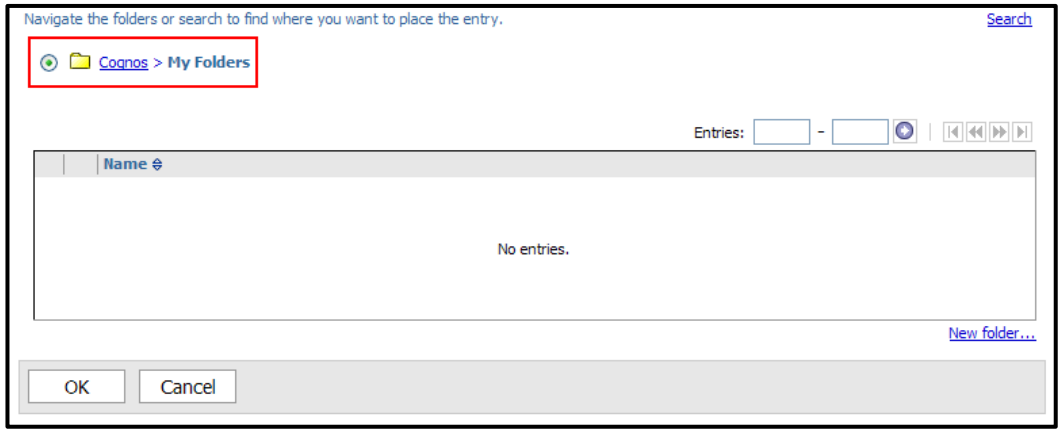
Topic Five – Saving a Report

Saving Reports – Public Folders

To change the save location from the **Save As** window, follow the steps listed below.

Saving Ad Hoc Reports – Public Folders (Graphics 2.2.5.3 – 2.2.5.4)	
1.	*Click* the **Select another location** link. •The **Select a Location** window appears
2.	*Click* the **Cognos** folder link. •The **Public Folders** link appears
continued on next slide. . .	

Graphic 2.2.5.3: Select Save Location



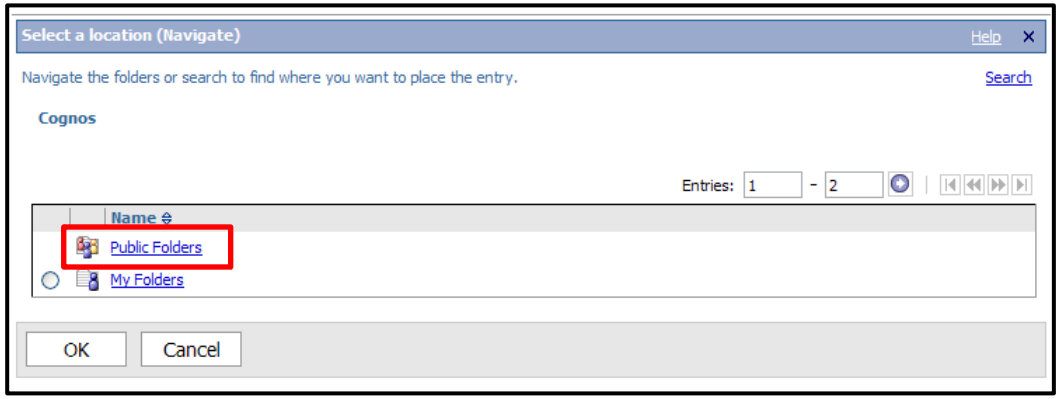
Graphic 2.2.5.4: Select a Location Window

Topic Five – Saving a Report

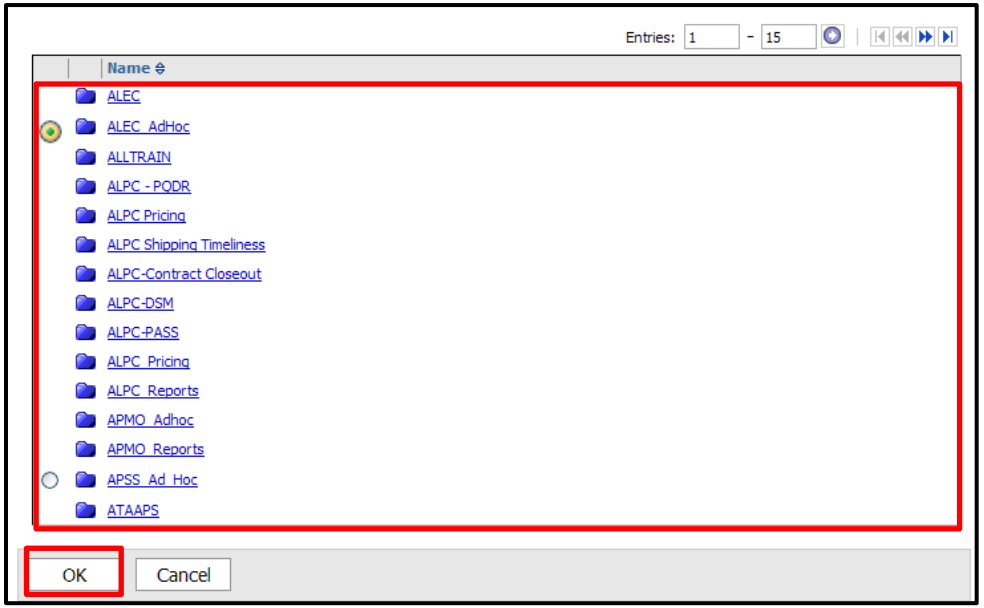
Saving Reports – Public Folders (Continued)

Saving Ad Hoc Reports – Public Folders (Graphics 2.2.5.5 – 2.2.5.6)	
3.	*Click* the **Public Folders** link. •The Public Folders list appears.
4.	*Click* the **radio button** to select a folder to save the report.
5.	*Click* **OK**. •The report has been saved in the selected Public Folder.

Note: All users with access to the *Public Folders* can view Ad hoc reports saved in that location.



Graphic 2.2.5.5: Public Folders Link



Graphic 2.2.5.6: Select Public Folder

Course Topics

Module Two – Lesson Two Review

Module Two – Lesson Two Review – Using FORM 1 Tracking Ad hoc Reports

Lesson Two covered the following topics:

Topic One	Inserting Data
Topic Two	Editing Data
Topic Three	Changing Layout
Topic Four	Running a Report
Topic Five	Saving a Report